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Sales Survey of the Soft Drink Industry

1983

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FOREWORD

Each year the National Soft Drink Association presents this review of the industry's sales performance based on a survey of Association members and other soft drink manufacturers and distributors.

This year NSDA enlarged the survey questionnaire to include more detailed information on the industry in an effort to accurately track the ever increasing diversification of flavors, packaging and sales channels.

In addition, the data this year were requested on a state-specific sales basis. The focus was on sales, although production data were requested in a separate section on each survey form. To avoid double counting, bottlers were asked not to include as sales goods sold to other bottlers. The result is *sales* (to the trade, third party operators or direct to consumers) and *production*, both on a state specific basis.

The procedure was also changed somewhat. Rather than mailing forms to each plant of a multi-plant company, the survey forms were mailed to the corporate headquarters, one form for each state in which the company has sales. If a franchise territory extended into a state, a form was provided regardless of whether that particular company had a manufacturing operation or a warehouse in the state. Often forms cover more than one facility. This occurs when a multi-facility company has more than one plant in a state. If there was no production in a specific state, that portion of the form was not completed by the responding company.

It is estimated that there is approximately 50% greater survey coverage in 1983 than in 1982. Put simply, this means the data are more accurate. The main reason for the greater coverage is a higher level of participation by the larger multi-facility, multi-state companies. By policy decision, NSDA does not aggregate the totals of multi-state companies. Forms are entered into the appropriate state files and corporate identity, if provided, is deleted. The original forms are destroyed.

As in previous surveys, the information provided was used to compute sales of packaged goods broken down by flavors and container type; bulk sales broken down by pre-mix and post-mix and by flavors; packaged distribution channels; packaged and bulk sales volume growth; and growth in dollars from 1982 to 1983.

However, this year's survey provides additional information not found in the earlier surveys. All charts and tables containing information not reported in previous surveys are highlighted with color shading. One example is the growth in industry employment over the previous year. As a necessary addition the decaffeinated market was surveyed and is now displayed. Greater detail is also now available for bulk sales distinguishing between diet and regular. Club soda/seltzer and aseptics are treated as separate categories, and for the first time, there are data on bulk sales channels. Also given for the first time are average package sizes and number of packaged units per gallon of sales, per standard 288 oz. case, and per dollar of sales. Additionally, data are provided on productivity. This is further segmented by the ratio of the respondent's sales volume to production volume as reported

on each form received by NSDA. Data for three ranges of these ratios are given.

As with earlier versions of this survey, the National Summary represents an estimate of the *total* industry's size and growth. Total industry includes bottler sales, food distributor sales and sales made directly to the fountain trade by the trademark owners.

While the principal focus of the survey is to ascertain industry *averages*, with careful attention to the survey design and analysis other comparative measures can be made available. This year data are presented on the performance, product composition and input/output relationships of the typical response. *Average* and *typical* are different concepts. More discussion of this distinction is contained in the relevant section of this report. A single example, however, illustrates the difference. The data show that the industry average growth rate is above that for the typical firm. This means that smaller operations are growing less rapidly than larger activities.

In future years, it is hoped to provide greater detail on vending, including detail on vending by third party operators; to provide details on method of sale—conventional, driver salesmen and pre- or tel-sell; to provide type of sweetener used; and to develop data on mode of delivery, whether conventional or multi-case module. The latter is often called bulk delivery which creates some opportunity for confusion with the bulk (syrup and pre-mix) sales data that are presented in this and earlier NSDA sales surveys.

As in the past, for the 1983 Survey, sales for both packaged and pre-mix and buik syrup markets were aggregated on a gallonage basis. That is, for packaged goods, physical cases were converted to equivalent gallons based on individual container sizes and units per case. Bulk post-mix was converted from syrup to finished gallons based on a reported range of 4 to 5.5 gallons of carbonated water to 1 gallon of syrup, i.e., 5 to 6.5 gallons of finished drink per gallon of syrup.

Results in some instances do not correspond precisely to other available information about trends and patterns in the soft drink industry. Such differences may occur because of sampling distortions related to the number of respondents and their type of operations, size and product definitions. However, it is believed that with the current level of industry response the NSDA survey has significantly greater coverage than any other survey conducted on an annual basis.

On five year intervals, the federal government conducts the *Census of Manufacturing*. This Census aims for 100% coverage of all the manufacturing establishments in the industry. An attempt to reconcile the 1982 Census with 1982 NSDA figures appears as part of this report. For various reasons, this attempt is not as successful as was hoped.

1983 NATIONAL SUMMARY

As earlier published reports indicated, 1983 was a good year for the soft drink industry. The NSDA survey confirms this, although it reveals a much greater shift to bulk (fountain syrup, special events and cup vending) than suggested by data published elsewhere. It appears that bulk sales increased by 9.42% with bottler bulk leading the way. Industry sales overall were up 5.13% as a result of the combined growth of 3.87% in packaged sales and the aforementioned bulk increase. Total sales represented 4,274,274,000 cases of standardized units (288 oz.). The growth was a combination of per capita (86%) and population (14%) increases.

Total dollar value increased by 7.1% during 1983 led by an increase of 18.9% in bulk sales followed by a 5.6% increase in packaged goods. The estimated wholesale value of soft drink industry sales that measured net of price-off and volume discounts was $20,562,545,000. Per capita consumption advanced to 438 12-ounce units, an increase of 4.4%.

Average container size increased slightly from 16.54 oz. per package unit in 1982 to 16.87 oz. in 1983. The number of containers filled increased by 1.84%. It is estimated that the industry filled 55.73 billion individual units in 1983. Of these, 42.34 billion were non-refillable containers.

Employment in the soft drink industry grew by a modest .96%. However, the volume of soft drinks sold per employee increased 5.0% in 1983. Sales dollars per employee grew at a 5.6% rate which is practically the same as the volume of output per employee. While the Consumer Price Index as a whole increased 3.2%, from data in the NSDA survey, it is estimated that wholesale prices for soft drinks increased by only 1.9%. According to the U.S. Government Bureau of Labor Statistics, the average retail price of soft drinks in 1983 was 2.46% higher than it was in 1982. It is clear that soft drinks, at both the wholesale and retail levels, lagged the general trend of price increases exhibited by other goods and services during the year. This continued throughout the year. Government figures measuring retail price changes from January 1983 to December 1983 show soft drink retail prices increased only 1.2%.*

According to the NSDA survey, the average wholesale price for a gallon of packaged soft drinks was $2.45 ($5.51 per 288 oz. cases), while it was $1.13 for a gallon of bulk measured on a finished drink basis.** On a total industry basis, an average gallon of soft drinks, whether packaged or bulk, wholesaled for $2.14. For bottlers, the 1983 figure for sales gallons per employee was 64,000. The average number of 288 oz. standard cases per employee was 28,444. For sales dollars per employee, the bottler's average was $157,300.

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* Bureau of Labor Statistics indices are weighted by NSDA survey results to obtain a composite percentage change in retail price.

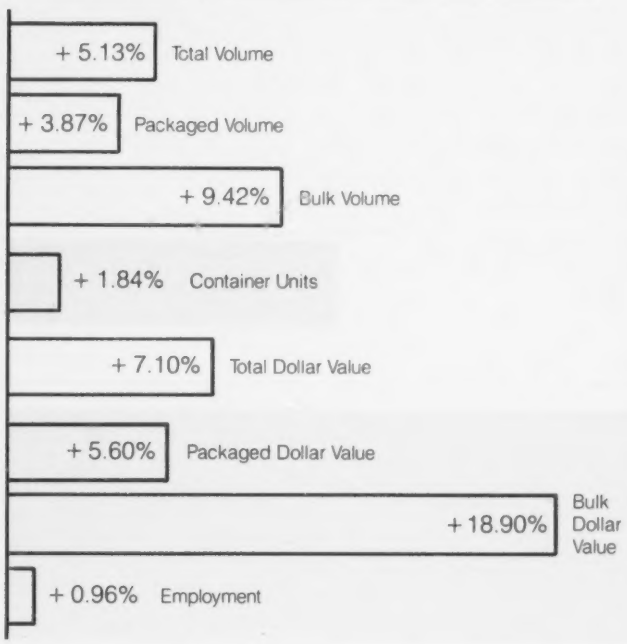
** Converting bulk in finished drink gallons back to syrup at a ratio of 5 parts carbonated water to 1 part syrup yields a figure of $6.78 for the average bottler wholesale price of a gallon of post-mix syrup.

NATIONAL DATA AND ANALYSES

Responses 292* Estimated Number of Plants 340

A. Summary Data

A.1 TOTAL SALES

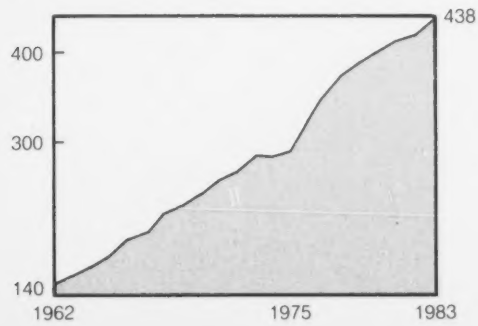


A.2 UNIT SALES

	1983	1982	$ Change
Container Units Per Gallon	7.58	7.74	−2.07%
Container Units Per 288 oz. case	17.06	17.42	−2.07%
Average Container Size (oz.)	16.87	16.54	+2.00%

A.3 PER CAPITA CONSUMPTION

in 12 oz. units



TOTAL SALES

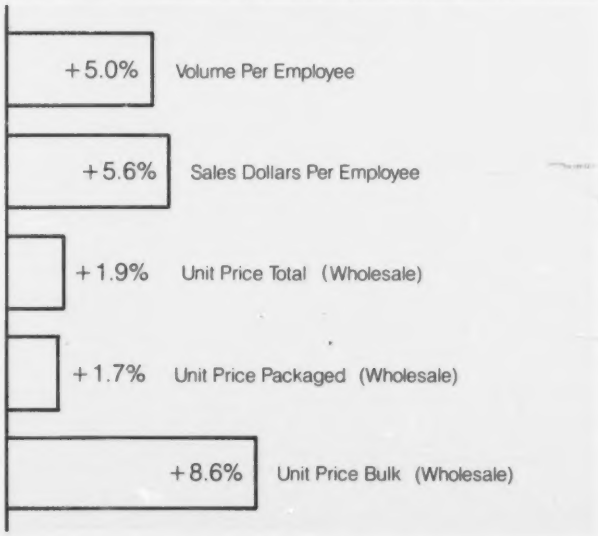
Soft drink sales and consumption rates increased in 1983 at rates substantially higher than those experienced by the industry in 1982. Total volume (bulk and packaged) grew at a 5.13% rate, with packaged at 3.87% and bulk at 9.42%. The comparable 1982 figures were: total, 2.7%; packaged, 2.4%; and bulk, 4.7%. The number of containers filled in 1983 rose by 1.84%. In 1982 the average container size was 16.54 oz. This increased by 2.0% to 16.87 oz. in 1983.

Total sales of 4,274,274,000 standard cases (288 oz.) represented a wholesale value estimated at $20.6 billion ($20,562,545,000). Total wholesale dollars is based on net sales, i.e., less volume discounts and price-off. On a comparable basis, 1982 wholesale dollars would have been $19.2 billion ($19,201,919,270). Thus, total dollar value rose by 7.1% in 1983. Per capita consumption advanced to 438 12-ounce units.

Average sales per employee—including all plant, route, warehouse and office personnel—averaged 64,000 gallons (28,444 standard 288 oz. cases) in 1983. Sales dollars, net of price-off and volume discounts, averaged $157,300. Increases over the prior year are given in A.4 as are changes in wholesale prices.

*292 forms were returned but 20 of them were unusable.

A.4 PRODUCTIVITY (SALES BASIS)

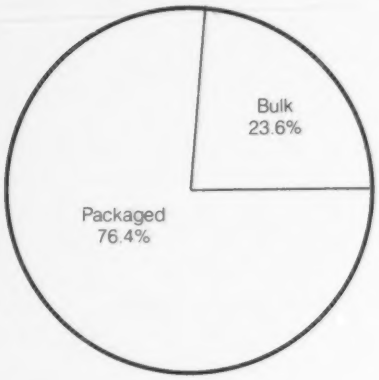


B. Market Share by Packaging Type

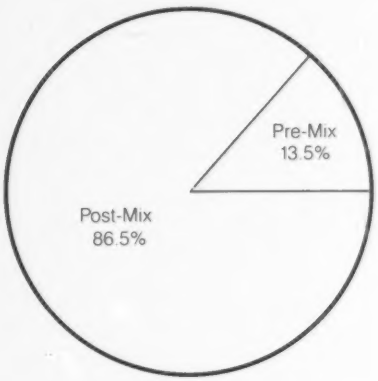
(Volume Basis)

B.1 PACKAGING

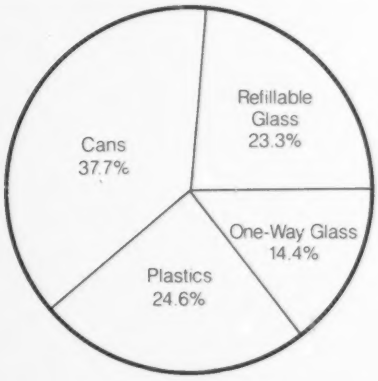
MARKET SHARES



B.2 BULK



B.3 PACKAGED



MARKET SHARES

Bulk packaging refers to the sale of pre-mix or syrup for use with dispensers or coin operated vending machines. It does not refer to palletized or other multi-case delivery. For 1983 bulk packaging accounted for 23.6% of the total national soft drink market with packaged sales holding 76.4%. This represented a shift of .9 percentage points from packaged to bulk since 1982. This translates into a 1.16% decrease in packaged market share and an increase in bulk share of 4.0%.

Post-mix accounted for 86.5% and pre-mix accounted for 13.5% of the bulk sales. Measured against 1982, this was a loss of pre-mix share of 1.6 percentage points which resulted in a decrease of 10.6% in market share.

In packaged sales, the market share for refillable glass was 23.3%; one-way glass, 14.4%; plastics, 24.6%; and cans, 37.7%. The changes in percentage points from 1982 were: refillable glass, −3.1; one-way glass, −1.3; plastics, + 3.2; and cans, + 1.2. The respective percentage changes in market share were: refillable glass, −11.7%; one-way glass, −8.3%; plastics, + 15.0%; and cans, +3.3%. All of the above, and the tables that follow, are on a volume of soft drinks sold basis, not number of containers.

*These two categories are the most susceptible to sampling error, particularly the ½ liter category whose use is concentrated in only a few market areas.

B.4 SOFT DRINK SALES: REFILLABLE GLASS

6-9 oz.	1.3%
10-12 oz.	8.8%
16 oz./½ liter	73.9%
24-32 oz./1 liter	16.0%
	100.0%

B.5 SOFT DRINK SALES: ONE-WAY GLASS

6-9 oz.	0.4%
10-12 oz.	18.6%
16 oz./½ liter	71.2%
24-32 oz./1 liter	9.8%
	100%

B.6 SOFT DRINK SALES: PLASTIC CONTAINERS

½ liter	1.9%*
1 liter	4.1%*
2 liter and larger	94.0%
	100%

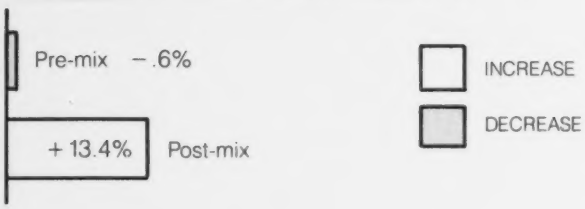
B.7 SOFT DRINK SALES: CANS

Aluminum	93.7%
Bi-metal	6.3%
	100.0%

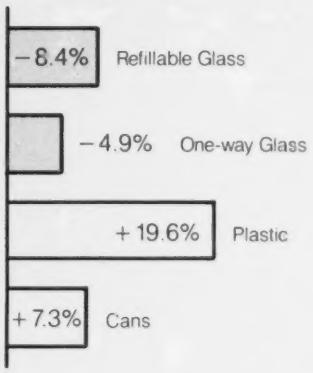
C. Changes in Soft Drink Sales by Packaging Type

(Volume Basis)

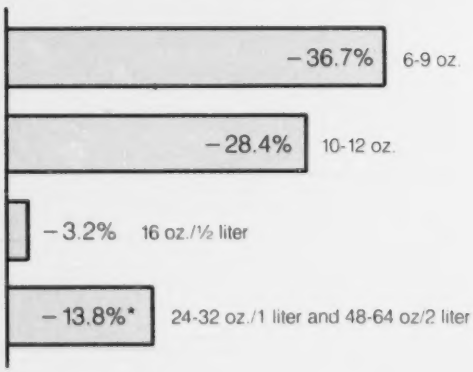
C.1 BULK SALES +9.42%



C.2 PACKAGED SALES +3.87%



C.3 REFILLABLE GLASS



* In 1983 the two largest glass container size categories were combined. To compare 1983 with 1982, the 1982 data for these sizes were totaled.

** See the earlier footnote in reference to these categories.

SALES

Bulk sales were up 9.42% in 1983. A −0.6% decrease in pre-mix was offset by a 13.4% increase in post-mix.

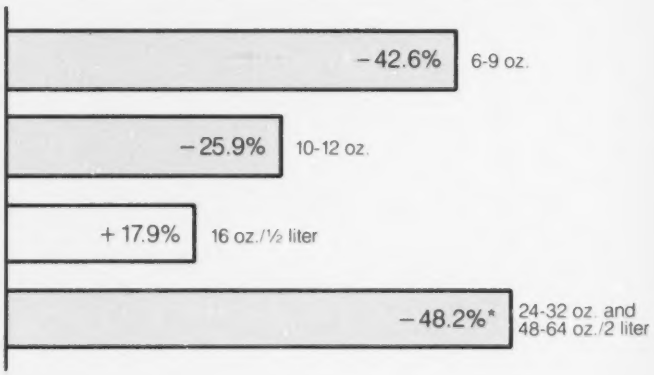
Packaged sales, in volume terms, were up 3.87% led by plastic at 19.6%. One-way glass fell by −4.9% and refillable glass declined by −8.4%. Can sales were up 7.3%.

The growth of soft drinks sold in plastic containers was dominated by one liter at 37.1%, followed by two liter at 19.5%. The ½ liter fell by −4.08%.**

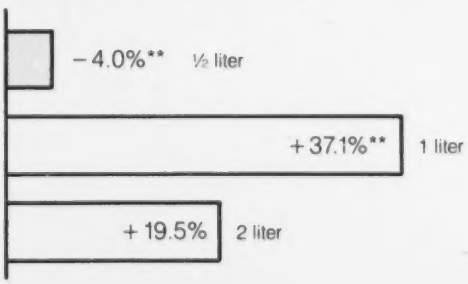
Among glass packages only the use of the 16-ounce one-way glass container grew. All other one-way and refillable glass containers declined in soft drink sales volume.

As data distinguishing between aluminum cans versus bi-metal cans were collected for the first time in 1983, it is not possible to determine the change in market share for each can type (bi-metal or aluminum).

C.4 ONE-WAY GLASS SALES

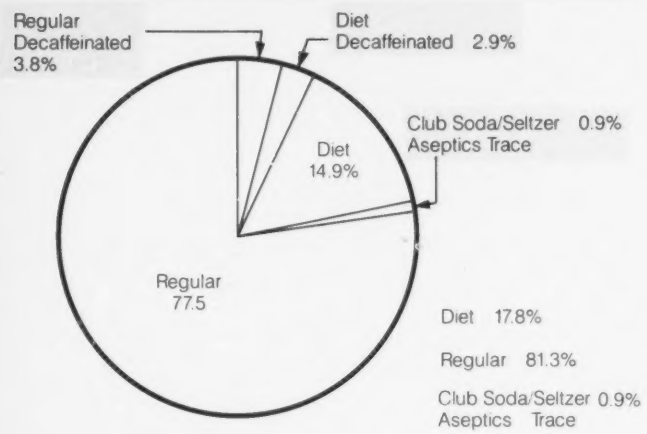


C.5 PLASTIC SALES

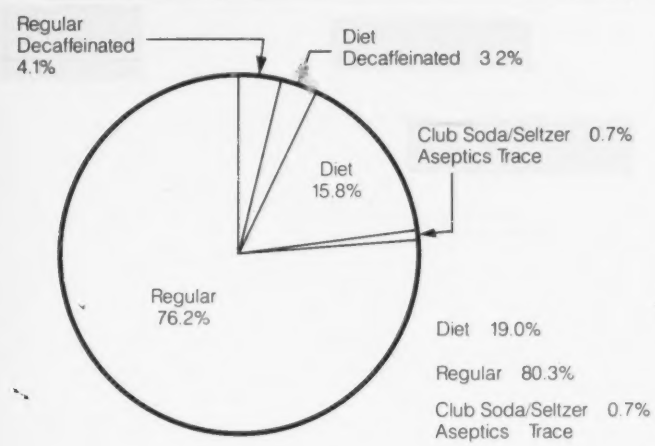


D. Market Shares by Beverage Type and Flavor

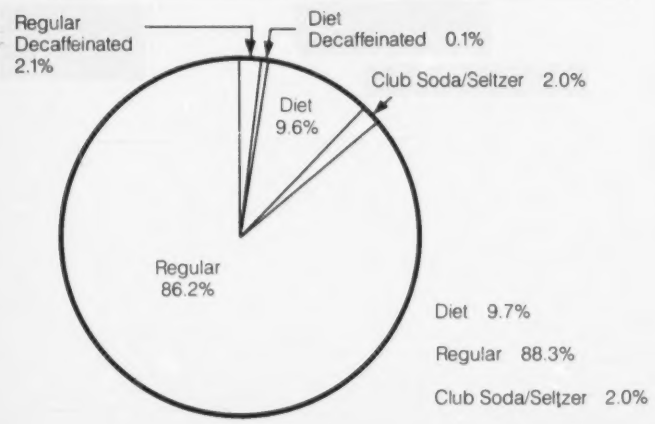
D.1 PACKAGED & BULK



D.2 PACKAGED



D.3 BULK



FLAVOR MIX

1983's flavor breakdown differs in four ways from previous years. The 1983 data are shown for total sales and separately for packaged and bulk sales. Previously only packaged flavor categories had been given.

Second, more bulk flavor categories were surveyed in 1983 but for comparative purposes the classifications are limited to what was collected for bulk flavors in 1982.*

Third, the aseptic market was surveyed for the first time. Less than 0.5% of total packaged sales were reported as aseptics. Aseptics are presented as a separate category, i.e., neither diet nor regular.

Fourth, club soda/seltzer is presented separately setting the stage for a "waters" category. Because it is non-caloric, a case can be made for classifying club soda/seltzer as diet. However, it is not marketed that way, and therefore it has not been classified as a diet drink. As a result of these decisions, the tables from D.5 through D.13 do not include aseptics or club soda/seltzer. They cover only the categories described in each table's title.

* The percentages shown for bulk sales by beverage type and flavor are derived from the results of this survey which covers bottlers only. However, they are applied to the total bulk market because no other information is available. This probably somewhat understates the cola and overstates the lemon lime category.

CAFFEINE FREE

An approximation of the total caffeine free market for packaged soft drinks can be made by adding the decaffeinated cola and decaffeinated pepper-type percentages to that of the lemon lime total. The result is 19.3%. The reason it is an approximation is that some portion of the lemon lime market contains caffeine. It is not possible to separate these sales from the general category of lemon lime. As a result, there is some minor overstatement in this estimate of the size of the caffeine free market.* Factually, most *flavors* are caffeine free. However, the latter are not marketed as caffeine free, and therefore they are not included in this category.

* As explained elsewhere, there is an implicit understatement of the cola share of total industry bulk when, because of data limitations, the bottlers' flavor mix is applied to the total bulk market. For this reason no estimate of the total (packaged plus bulk) caffeine free market is made here.

D.4 FLAVOR

	Packaged	Bulk	Total
Cola	65.0	63.2	64.7
Lemon Lime	11.9	7.6	11.3
Club Soda/ Seltzer	0.7	2.0	0.9
Aseptic	0.0	—	0.0
Other	22.4	27.2	23.1
	100.0%	100.0%	100.0%

D.5 BEVERAGE TYPE

	Packaged	Bulk	Total
Regular	80.8	90.2	82.1
Diet	19.2	9.8	17.9
	100.0%	100.0%	100.0%

D.6 REGULAR

	Packaged	Bulk	Total
Cola	63.7	62.3	63.5
Lemon Lime	12.0	7.8	11.4
Other	24.3	29.9	25.1
	100.0%	100.0%	100.0%

D.7 DIET

	Packaged	Bulk	Total
Cola	72.7	84.8	73.6
Lemon Lime	11.8	7.1	11.5
Other	15.5	8.1	14.9
	100.0%	100.0%	100.0%

D.8 CHANGE IN REGULAR VERSUS DIET SHARES (by volume)

	Packaged	Bulk	Total
Regular	+2.6%	+10.0%	+4.9%
Diet	+13.6%	+24.2%	+14.0%

D.9 CHANGE IN FLAVOR MIX: PACKAGED ONLY (by volume)

	Regular	Diet
Cola	+9.7%	+29.9%
Lemon Lime	+10.0%	−3.2%
Other	−14.8%	−22.1%

D.10 COLA

	Packaged	Bulk	Total
Regular	78.7	87.1	79.8
Diet	21.3	12.9	20.2
	100.0%	100.0%	100.0%

D.11 LEMON LIME

	Packaged	Bulk	Total
Regular	81.0	91.0	81.9
Diet	19.0	9.0	18.1
	100.0%	100.0%	100.0%

D.12 REGULAR COLA

	Packaged	Bulk	Total
Regular	92.2	98.9	93.7
Decaffeinated	7.8	1.1	6.3
	100.0%	100.0%	100.0%

D.13 DIET COLA

	Packaged	Bulk	Total
Regular	68.6	98.5	80.1
Decaffeinated	31.4	1.5	19.9
	100.0%	100.0%	100.0%

D.14 FLAVOR SUMMARY OF THE PACKAGED SOFT DRINK MARKET IN PERCENT

Regular		
Cola	47.5	
Lemon Lime	9.6	
Orange	3.8	
Ginger Ale	1.1	
Grape	0.7	
Root Beer	1.6	
Pepper-type	5.3	
Non-Carbonated	0.7	
Other	5.8	
Decaffeinated Cola	3.7	
Decaffeinated Pepper-type	0.4	
Sub-Total		80.2%
Diet		
Cola	10.9	
Lemon Lime	2.3	
Orange	0.4	
Ginger Ale	0.1	
Grape	.0	
Root Beer	0.3	
Pepper-type	1.2	
Non-Carbonated	.0	
Other	0.6	
Decaffeinated	3.0	
Decaffeinated Pepper-type	0.3	
Sub-Total		19.1%
Club Soda/Seltzer		0.7%
Aseptics		Trace
		100.0%

E. Distribution*

E.1 DISTRIBUTION CHANNELS

Home Market	Packaged	Bulk
Supermarket	43.6	2.2
Grocery	12.1	0.7
Drug/Convenience	13.5	(1)
Other Home Market	7.0	0.9
Total Home Market	76.2%	3.8%
On-Premise		
Vending	13.6	6.4
Restaurant/Bar/Fast Food	3.5	67.2
Drug/Convenience	(1)	7.4
Other On-Premise	6.7	15.2
Total On-Premise	23.8%	96.2%

(1) Explained in text

E.2 DISTRIBUTION WITHIN CHANNELS

	Packaged	Bulk	Total
Supermarket	99.2	0.8	100.0%
Grocery	99.1	0.9	100.0%
Drug/Convenience	92.0	8.0	100.0%
Other Home Market	97.9	2.1	100.0%
Vending	93.1	6.9	100.0%
Restaurant/Bar/ Fast Food	24.8	75.2	100.0%
Other On-Premise	73.4	26.6	100.0%

* Derived from survey of bottlers. Does not include direct sales or syrup distribution by food brokers.

DISTRIBUTION

An addition to this year's survey are data on bottlers' bulk distribution. Also packaging channels have been expanded to include on-premise sales. Supermarket, grocery, convenience and drug stores accounted for 69.2 percent of the packaged sales. In future surveys, an attempt will be made to distinguish between convenience and drug stores to more accurately provide a Food Stores Category similar to what is reported by A. C. Nielsen.

In allocating drug and convenience store volume between on-premise and home market, all bulk was allocated to on-premise which is probably correct. However, all of the packaged was assigned to the home market. This is because no data are available on which to base an allocation. Undoubtedly, some is consumed on-premise, but bottlers cannot make this distinction.

Also, it is believed that vending understates the amount of soft drinks sold through vending machines. For the most part, it is believed that bottlers report only their full-service vending. They are not in a position to report on whether a third party operator vends or otherwise sells the product sold to him. Rather than vend, the third party may merchandise the product directly to the public or perhaps to an account like a corporate cafeteria or an airline. Bottlers also do not have a reliable way to estimate vending sales when a trade account fills a vending machine such as is the case with many food stores with machines on-premise. Because they are unknown, such sales are not included in vending and consequently in the on-premise totals in Tables E.1 or E.2.

F. Productivity

F.1 PRODUCTIVITY AS A FUNCTION OF THE SALES TO PRODUCTION RATIO

Sales/Production Ratio greater than 1.2

Sales Dollars/Employee	$143,790
Sales Gallons/Employee	64,580
(28,702 standard 288 oz. cases)	

Sales/Production Ratios in the range 1.2 or less and equal to or greater than 0.8

Sales Dollars/Employee	$166,340
Sales Gallons/Employee	63,110
(28,049 standard 288 oz. cases)	

Sales/Production Ratios less than 0.8

Sales Dollars/Employee	$119,100
Sales Gallons/Employee	57,760
(25,671 standard 288 oz. cases)	

PRODUCTIVITY

Although 1983 Sales Survey responses were solicited on a state specific sales basis, production data were also requested for plants located in the state covered by the form. Whether measured in volume or dollar terms, analysis revealed a good deal of variability in the sales per employee relationship. Forms with the highest levels of production, taken in relation to sales, were more labor intensive, i.e., there were fewer dollars of sales or less gallonage sold per employee. Table F.1 presents the results of this analysis with the respondents divided into three groups according to their ratio of sales volume to production volume. The data are weighted by the sales volume of each response.

G. Typical Responses

G.1 GROWTH PERCENTAGES

Volume Growth	+16.2%
Sales Dollar Growth	+ 6.5%
Employment Growth	+ 2.1%

G.2 PACKAGE MIX

Refillable Glass	24.5%
Non-refillable Glass	14.0%
Plastic	24.2%
Cans	37.3%

G.3 FLAVORS (Packaged and Bulk Combined)

Cola	58.9%
Lemon Lime	14.4%
Other	26.7%

G.4 PRODUCTIVITY

Sales Volume/Employee	67,460 gallons (29,982 standard 288 oz. cases)
Sales Dollars/Employee	$166,390
Growth Sales Volume/Employee	+4.65%
Growth Sales Dollars/Employee	+5.53%

TYPICAL RESPONSE CONTRASTED TO INDUSTRY AVERAGE

All data presented up to this point represent industry averages. Each response has been given a weight in proportion to its sales volume. In this section, each response is given an equal weight, i.e., a weight of one regardless of the amount of sales reported. Think in terms of what a response would look like if a form was picked at random. These data are presented in this section.

G.5 SALES

Sales Volume	11,227,900 gallons (4,990,177 standard 288 oz. cases)
Sales Dollars	$26,381,000

REGIONAL DATA

Northeastern Region

Connecticut
Delaware
District of Columbia
Maine
Maryland
Massachusetts
New Hampshire
New Jersey
New York
Pennsylvania
Rhode Island
Vermont

East Central Region

Illinois
Indiana
Kentucky
Michigan
Ohio
West Virginia
Wisconsin

West Central Region

Iowa
Kansas
Minnesota
Missouri
Nebraska
North Dakota
South Dakota

Southern Region

Alabama
Arkansas
Florida
Georgia
Louisiana
Mississippi
North Carolina
South Carolina
Tennessee
Virginia

Western Region

Colorado
Idaho
Montana
Nevada
Utah
Wyoming

Pacific Region

Alaska
California
Hawaii
Oregon
Washington

Southwestern Region

Arizona
New Mexico
Oklahoma
Texas

Regional Summary Data*

CHANGE FROM PREVIOUS YEAR (ALL FIGURES IN PERCENT)

	Northeastern	Southern	East Central	West Central	Southwestern	Western	Pacific
Total Volume	8.6	4.8	4.3	6.9	4.0	4.9	6.1
Packaged Volume	8.0	4.2	3.7	5.9	3.0	0.8	2.1
Bulk Volume	14.4	9.3	7.4	10.5	9.5	20.7	19.4
Total Dollar Value	8.6	9.2	4.7	10.8	7.3	10.4	7.5
Packaged Dollar Value	5.6	7.0	5.0	10.4	6.4	5.0	5.8
Bulk Dollar Value	39.6	27.0	3.2	12.5	12.3	31.1	13.4
Employment	3.2	0.6	1.7	−2.2	−1.5	7.4	3.6

* Regional data are more affected by sample size variation and differences in respondents between the two years necessary for the calculation of growth rates than is the case with the national data. Regional data is for the bottler portion of market only.

MARKET SHARES (ALL FIGURES IN PERCENT)

	Northeastern	Southern	East Central	West Central	Southwestern	Western	Pacific
1. Market Share By Market Type							
Packaged	91.1	88.9	84.7	79.4	84.2	79.5	77.1
Bulk	8.9	11.1	15.3	20.6	15.8	20.5	22.9
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
2. Bulk							
Pre-Mix	24.8	15.6	13.7	13.1	7.6	13.0	8.9
Post-Mix	75.2	84.4	86.3	86.9	92.4	87.0	91.1
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
3. Packaged							
Refillable Glass	7.8	22.6	44.9	28.9	12.4	11.9	16.6
One-Way Glass	18.2	17.6	6.4	9.3	18.0	8.2	8.2
Plastics	40.3	27.5	18.2	20.7	22.5	17.4	17.8
Cans	33.7	32.3	30.5	41.1	47.1	62.5	57.4
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
4. Refillable Glass							
6-9 oz.	2.5	3.4	0.2	trace	3.6	0.4	0.4
10-12 oz.	13.0	17.9	3.2	13.0	17.6	11.2	6.0
16 oz. 0.5 liter	56.1	53.1	92.2	78.8	6.8	70.6	80.2
24-32 oz.	28.4	25.6	4.4	8.2	72.0	17.8	13.4
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
5. One-Way Glass							
6-9 oz.	1.4	0.1	0.3	trace	trace	trace	0.1
10-12 oz.	12.6	29.1	12.6	10.2	27.2	15.3	21.3
16 oz. 0.5 liter	79.1	66.9	80.7	82.0	67.6	73.1	72.3
24-32 oz.	6.9	3.9	6.4	7.8	5.2	11.6	6.3
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
6. Plastic							
0.5 liter	1.6	0.6	2.3	4.4	0.3	0.6	9.4
1 liter	11.3	1.2	2.7	1.8	0.4	trace	8.1
2 liter & larger	87.1	98.2	95.0	93.8	99.3	99.4	82.5
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
7. Cans							
Aluminum	93.8	93.8	95.7	56.0	100.0	100.0	100.0
Bi-Metal	6.1	6.1	4.3	44.0	0.0	0.0	0.0
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
8. Package Growth							
Refillable Glass	−18.1	−25.8	20.7	61.1	−18.5	−29.3	8.8
One-Way Glass	−18.2	−0.3	−12.8	31.3	−28.5	−28.7	−8.9
Plastics	33.0	33.6	42.5	84.3	29.3	207.8	21.2
Cans	10.4	18.4	−21.9	−29.1	19.5	−4.3	−2.8
9. Packaged & Bulk Flavor Type							
Regular	73.0	81.1	76.4	77.9	81.3	74.1	73.4
Regular Decaffeinated	3.7	3.2	5.4	4.8	2.3	4.7	3.4
Total Regular	76.7	84.3	81.8	82.7	83.6	78.8	76.8
Diet	19.2	13.2	13.5	12.9	13.7	16.9	17.9
Diet Decaffeinated	3.0	1.9	3.3	4.1	2.4	3.3	4.3
Total Diet	22.2	15.1	16.8	17.0	16.1	20.2	22.2
Club Soda/Seltzer	1.1	0.6	1.4	0.3	0.3	1.0	1.0
Aseptics	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0
10. Packaged Flavor Type							
Regular	72.2	79.9	75.7	75.5	79.0	70.3	70.3
Regular Decaffeinated	3.4	3.4	6.1	5.5	2.6	5.7	3.7
Total Regular	75.6	83.3	81.8	81.0	81.6	76.0	74.0
Diet	19.9	13.9	14.0	13.7	15.3	18.8	19.4
Diet Decaffeinated	3.3	2.1	3.8	5.0	2.7	4.2	5.5
Total Diet	23.2	16.0	17.8	18.7	18.0	23.0	24.9
Club Soda/Seltzer	1.0	0.7	0.4	0.3	0.4	1.0	1.1
Aseptics	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0
11. Bulk Flavor Type							
Regular	80.9	90.3	80.9	86.5	94.0	88.8	83.7
Regular Decaffeinated	6.1	1.7	1.7	2.1	0.4	0.9	2.7
Total Regular	87.0	92.0	82.6	88.6	94.4	89.7	86.4
Diet	12.3	7.5	10.0	10.7	5.4	9.1	12.8
Diet Decaffeinated	0.2	0.1	0.2	0.2	0.1	0.1	0.2
Total Diet	12.5	7.6	10.2	10.9	5.5	9.2	13.0
Club Soda/Seltzer	0.5	0.4	7.2	0.5	0.1	1.1	0.6
Aseptics	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0

MARKET SHARES (ALL FIGURES IN PERCENT)

	Northeastern Region			Southern Region			East Central Region		
	Packaged	Bulk	Total	Packaged	Bulk	Total	Packaged	Bulk	Total
12. Flavor									
Cola	68.1	68.5	68.1	67.9	70.2	68.2	68.2	62.3	67.3
Lemon Lime	9.0	6.1	8.8	11.9	6.5	11.3	11.8	8.2	11.3
Club Soda/Seltzer	1.2	0.5	1.1	0.7	0.4	0.6	0.4	7.3	1.4
Aseptics	—	—	—	—	—	—	—	—	—
Other	21.7	24.9	22.0	19.5	22.9	19.9	19.6	22.2	20.0
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
13. Beverage Type									
Regular	76.5	87.5	77.5	83.9	92.4	84.9	82.0	89.1	83.1
Diet	23.5	12.5	22.5	16.1	7.6	15.1	18.0	10.9	16.9
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
14. Regular									
Cola	65.7	66.2	65.7	67.3	68.7	67.5	67.1	64.8	66.8
Lemon Lime	9.1	5.8	8.8	12.3	7.0	11.6	11.5	8.5	11.0
Other	25.2	28.0	25.5	20.4	24.3	20.9	21.4	26.7	22.2
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
15. Diet									
Cola	79.2	87.8	79.6	73.8	92.4	74.8	74.6	86.3	75.8
Lemon Lime	9.2	8.0	9.2	10.7	1.5	10.2	13.6	12.1	13.4
Other	11.6	4.2	11.2	15.5	6.1	15.0	11.8	1.6	10.8
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
16. Cola									
Regular	73.0	84.1	74.0	82.6	90.0	83.5	80.4	85.9	81.2
Diet	27.0	15.9	26.0	17.4	10.0	16.5	19.6	14.1	18.8
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
17. Lemon Lime									
Regular	76.2	83.6	76.7	85.7	98.2	86.5	79.5	85.1	80.1
Diet	23.8	16.4	23.3	14.3	1.8	13.5	20.5	14.9	19.9
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
18. Regular Cola									
Regular	93.1	99.9	93.8	95.2	99.1	95.7	89.4	97.9	90.7
Decaffeinated	6.9	0.1	6.2	4.8	0.9	4.3	10.6	2.1	9.3
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
19. Diet Cola									
Regular	82.8	98.6	83.6	82.7	98.6	83.8	71.4	98.1	74.2
Decaffeinated	17.2	1.4	16.4	17.3	1.4	16.2	28.6	1.9	25.8
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

MARKET SHARES (ALL FIGURES IN PERCENT)

West Central Region			Southwestern Region			Western Region			Pacific Region		
Packaged	Bulk	Total	Packaged	Bulk	Total	Packaged	Bulk	Total	Packaged	Bulk	Total
62.8	67.2	63.8	52.1	47.6	51.5	63.1	66.9	63.9	64.7	63.8	64.4
18.4	6.4	15.9	12.5	9.3	12.0	21.4	14.7	20.0	9.8	6.8	9.2
0.3	0.5	0.3	0.4	0.1	0.3	1.0	1.1	1.0	1.1	0.6	1.0
—	—	—	—	—	—	—	—	—	—	—	—
18.5	25.9	20.0	35.0	43.0	36.2	14.5	17.3	15.1	24.4	28.8	25.4
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
81.4	89.0	82.9	81.9	94.5	83.9	76.8	90.7	79.7	74.8	86.9	77.6
18.6	11.0	17.1	18.1	5.5	16.1	23.2	9.3	20.3	25.2	13.1	22.4
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
61.3	65.1	62.1	52.1	47.8	51.3	60.5	64.9	61.5	61.3	60.2	61.0
18.2	5.8	15.5	12.5	9.4	11.9	22.5	16.0	21.0	10.1	7.6	9.5
20.5	29.1	22.4	35.4	42.8	36.8	17.0	19.1	17.5	28.6	32.2	29.5
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
70.7	86.7	72.8	53.5	44.7	53.1	74.6	93.7	76.3	77.5	89.9	79.1
19.5	12.1	18.5	12.9	8.5	12.6	18.6	4.1	17.3	9.4	2.5	8.5
9.8	1.2	8.7	33.6	46.8	34.3	6.8	2.2	6.4	13.1	7.6	12.4
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
79.1	85.9	80.6	81.5	94.8	83.5	72.9	87.1	75.9	70.1	81.6	72.7
20.9	14.1	19.4	18.5	5.2	16.5	27.1	12.9	24.1	29.9	18.4	27.3
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
80.3	79.6	80.3	81.5	95.0	83.1	80.0	97.4	82.6	76.2	95.3	79.5
19.7	20.4	19.7	18.5	5.0	16.9	20.0	2.6	17.4	23.8	4.7	20.5
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
89.0	98.6	91.2	95.7	99.0	96.3	87.5	98.4	90.2	92.3	99.7	94.2
11.0	1.4	8.8	4.3	1.0	3.7	12.5	1.6	9.8	7.7	0.3	5.8
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
62.2	97.7	67.7	87.7	97.2	88.2	75.9	99.1	78.5	74.2	99.2	78.0
37.8	2.3	32.3	12.3	2.8	11.8	24.1	0.9	21.5	25.8	0.8	22.0
100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

MARKET SHARES (ALL FIGURES IN PERCENT)

	Northeastern	Southern	East Central	West Central	Southwestern	Western	Pacific
20. Flavor Summary							
Regular							
Cola	46.3	53.4	49.1	44.2	40.5	40.3	41.8
Lemon Lime	6.9	10.2	9.4	14.8	10.2	17.1	7.5
Orange	5.4	3.0	3.7	2.1	4.3	1.8	4.6
Ginger Ale	3.7	0.4	0.6	0.8	0.6	1.2	0.9
Grape	0.8	0.7	0.3	0.5	1.1	0.9	0.4
Root Beer	1.9	0.8	1.4	1.8	2.2	2.4	2.3
Pepper-type	1.4	5.8	2.8	3.0	15.4	2.0	4.1
Non-Carbonated	1.2	0.4	0.7	0.5	0.6	0.5	1.5
Other	4.6	5.2	7.7	7.9	4.0	4.1	7.2
Decaffeinated Cola	3.4	2.7	5.8	5.5	1.8	5.7	3.5
Decaffeinated Pepper-type	0.0	0.7	0.3	0.0	0.8	0.0	0.2
Diet							
Cola	15.2	9.7	9.5	8.2	8.5	13.0	14.3
Lemon Lime	2.1	1.7	2.4	3.6	2.3	4.3	2.3
Orange	0.7	0.3	0.3	0.0	0.5	0.1	0.3
Ginger Ale	0.5	0.0	0.1	0.1	0.1	0.1	0.1
Grape	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Root Beer	0.5	0.1	0.2	0.3	0.4	0.3	0.5
Pepper-type	0.4	1.2	0.6	0.9	3.2	0.3	1.3
Non-Carbonated	0.2	0.0	0.0	0.0	0.0	0.0	0.1
Other	0.3	0.8	0.9	0.5	0.4	0.6	0.5
Decaffeinated Cola	3.2	2.0	3.8	5.0	1.2	4.1	5.0
Decaffeinated Pepper-type	0.1	0.1	0.0	0.0	1.5	0.1	0.5
Club Soda/Seltzer	1.2	0.7	0.4	0.3	0.4	1.0	1.1
Aseptics	—	—	—	—	—	—	—
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0

MARKET SHARES (ALL FIGURES IN PERCENT)

	Northeastern Region			Southern Region			East Central Region		
	Packaged	Bulk	Total	Packaged	Bulk	Total	Packaged	Bulk	Total
21. Distribution									
Supermarket	44.3	0.4	40.7	44.1	3.7	39.7	42.3	1.1	37.2
Grocery	14.9	0.1	13.7	10.1	1.3	9.2	13.1	0.4	11.5
Drug/Convenience	11.8	3.4	11.1	13.6	4.6	12.6	15.0	2.5	13.4
Other Home Market	5.8	0.1	5.4	4.9	3.0	4.7	7.5	0.4	6.6
Vending	14.4	2.9	13.4	17.9	17.1	17.8	10.5	5.6	9.9
Restaurant/Bar/Fast Food	4.7	81.1	10.9	2.7	53.8	8.2	2.7	64.0	10.3
Other On-Premise	4.1	12.0	4.8	6.7	16.5	7.8	8.9	26.0	11.1
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

	West Central Region			Southwestern Region		
	Packaged	Bulk	Total	Packaged	Bulk	Total
21. Distribution (cont.)						
Supermarket	42.3	6.6	34.6	33.4	3.7	29.1
Grocery	9.8	1.0	7.9	8.8	1.5	7.8
Drug/Convenience	17.4	12.8	16.4	13.9	2.3	12.3
Other Home Market	5.8	2.0	5.0	14.9	0.1	12.7
Vending	15.8	12.0	15.0	16.6	1.6	14.4
Restaurant/Bar/Fast Food	2.4	55.2	13.8	6.4	85.9	17.9
Other On-Premise	6.5	10.4	7.3	6.0	4.9	5.8
Total	100.0	100.0	100.0	100.0	100.0	100.0

	Western Region			Pacific Region		
	Packaged	Bulk	Total	Packaged	Bulk	Total
21. Distribution (cont.)						
Supermarket	57.1	1.4	48.7	49.2	0.1	37.8
Grocery	10.5	23.8	12.5	12.4	0.1	9.5
Drug/Convenience	12.2	5.4	11.1	12.0	14.2	12.5
Other Home Market	9.5	0.2	8.1	7.7	0.1	5.9
Vending	9.7	0.1	8.2	6.3	0.1	4.9
Restaurant/Bar/Fast Food	0.7	51.1	8.4	3.3	71.4	19.2
Other On-Premise	0.3	18.0	3.0	9.1	14.0	10.2
Total	100.0	100.0	100.0	100.0	100.0	100.0

RECONCILIATION OF 1982 NATIONAL SOFT DRINK ASSOCIATION ESTIMATE WITH 1982 U.S. CENSUS OF MANUFACTURERS

During 1983 the Bureau of the Census published preliminary data on the 1982 Census of Manufacturers. The Census is conducted at five-year intervals and purports to survey all U.S. manufacturing activity. Bottled and Canned Soft Drinks is one such activity. When published, which occurs with some time lag, NSDA attempts to reconcile the Census estimates of industry volume with NSDA's results for the same year. In past years this has been accomplished relatively successfully for packaged goods. For many years, it has not been possible to reconcile bulk sales because of the classification scheme used by the Census. In the bulk area the Census definitions simply do not lend themselves to the identification of soft drink fountain sales. An attempt to reconcile 1982 NSDA packaged sales estimates with the 1982 Census results follows:

	Volume Estimate (288 oz. cases)
National Soft Drink Association 1982 Sales Survey Estimate of Packaged Goods Sales	3,142,889,000
1982 Census of Manufacturers Carbonated Drinks	
6 to 32 oz. bottles (mostly glass)	808,170,000
Other size bottles (mostly plastic)	382,711,000
Cans	914,800,000
Non-Carbonated With or Without Real Juice	321,180,000
Soft Drinks Not Specified by Kind	517,778,000
Total Census Estimates of Packaged Soft Drinks 1982	2,944,639,000

The Census and NSDA estimates are somewhat close. The NSDA figure is 6.7% higher than the Census. Other industry estimates tend to cluster around the NSDA figure. In addition, it is believed that the juice drinks included in the Census figures are not manufactured by soft drink bottlers and therefore, are not in the NSDA or other privately developed estimates. If this is the case, the Census' soft drink estimate falls to 2,665,805,000 cases. The gap between NSDA and Census estimates opens to 18%.

As a result of the uncertainty about the comparability of the Census figures, no adjustment has been made to the original NSDA 1982 soft drink sales estimate. NSDA is involved in discussions with the Bureau of the Census aimed at making the 1987 Census of Manufacturers more useful as a means to re-benchmark the earlier published estimates made by NSDA and others.

Estimated Annual Production and Consumption of Soft Drinks

Year	Total Value $ (Wholesale)	Total Cases (288 ounce)	Per capita (12 oz. containers)
1983	20,562,545,000 (see note)	4,274,274,000	438.0
1982	21,156,140,000	4,065,815,000	419.5
1981	20,015,269,000	3,959,697,000	412.3
1980	17,676,648,000	3,816,575,000	401.0
1979	14,972,628,000	3,664,500,000	389.0
1978	13,344,588,000	3,490,000,000	375.0
1977	11,526,810,000	3,247,722,000	353.0
1976	10,375,167,000	2,952,474,700	324.0
1975	9,397,797,600	2,610,499,300	289.0
1974	7,827,131,000	2,532,007,300	283.0
1973	6,223,156,500	2,514,406,700	284.0
1972	5,683,820,000	2,360,944,700	269.0
1971	5,346,960,000	2,235,743,300	258.0
1970	4,799,784,000	2,064,423,300	241.0
1969	4,369,664,000	1,942,073,300	229.6
1968	4,165,552,000	1,851,356,700	221.1
1967	3,458,632,000	1,646,968,000	198.7
1966	3,175,980,000	1,568,391,300	191.3
1965	2,735,567,000	1,402,854,700	172.7
1964	2,533,167,000	1,299,060,000	161.9
1963	2,341,189,000	1,200,601,000	151.6
1962	2,001,016,800	1,111,676,000	142.3
1961	1,829,083,200	1,016,157,300	132.2
1960	1,698,025,600	984,362,700	128.0
1959	1,633,015,900	989,706,700	133.2
1958	1,427,463,500	906,326,000	124.3
1957	1,347,241,500	907,233,300	126.1
1956	1,308,000,000	880,809,300	125.9
1955	1,252,276,000	843,283,300	122.8
1954	1,166,605,000	784,449,300	116.1
1953	1,089,513,000	785,234,700	118.3
1952	1,019,295,000	755,033,300	116.0
1951	939,442,500	695,883,300	108.5
1950	876,532,600	667,834,300	105.3
1949	860,959,300	675,262,200	108.0
1948	835,157,300	673,242,500	109.6
1947	745,676,000	601,109,300	100.6
1946	617,168,600	514,307,200	88.2
1945	584,994,000	487,495,000	88.6
1939	361,690,917	321,997,120	59.1
1929	214,322,238	181,618,990	35.4
1919	135,341,000	112,784,100	25.6
1909	43,508,000	41,436,200	10.8
1899	23,269,000	28,854,450	8.1
1889	14,354,000	17,398,800	6.6
1879	4,742,000	6,322,700	3.0
1869	4,222,000	5,629,300	4.3
1859	1,415,000	1,886,700	1.5
1849	760,000	1,013,300	1.1

NOTE: 1983 mid-year Resident Population was 233,981,000 according to U.S. Bureau of the Census. For purposes of this report, soft drink sales for the industry as a whole are expressed in cases of 24 twelve-ounce containers. For 1983 the sales value was explicitly requested as "net of volume discounts and price off." Comparable 1982 data were also requested. The result is a definitional revision to the 1982 data. The new figure is $19,201,919,270. The increase in sales value (1982 to 1983) is as reported in the text, 7.1%

Notes

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ERRATA

SALES SURVEY OF THE SOFT DRINK INDUSTRY

For the National Data and Analyses section on page 4, please note the corrected chart below.

A.2 UNIT SALES

	1983	1982	Change
Container Units Per Gallon	7.58	7.74	−2.07%
Container Units Per 288 oz. case	17.06	17.42	−2.07%
Average Container Size (oz.)	16.87	16.54	+2.00%